

Responsible Office: Office of Small and Disadvantaged Business Utilization (Code K)  
**Subject:** Outreach



## **Office of Small and Disadvantaged Business Utilization (HQ/Code K)**

### **Office Work Instruction**

## **Outreach**

Approved by: Original signed by Ralph Thomas, III 5/10/00  
Ralph Thomas, III  
Associate Administrator for  
The Office of Small and Disadvantaged Business Utilization

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## DOCUMENT HISTORY LOG

<u>Status</u> <u>(Baseline/</u> <u>Revision/</u> <u>Canceled)</u>	<u>Document</u> <u>Revision</u>	<u>Effective</u> <u>Date</u>	<u>Description</u>
Baseline		2/4/00	
Revision	A	5/10/00	Revisions made based on systemic analysis of ISO 9001 Registrar comments provided during February 2000 ISO 9001 Registrar precertification audit of NASA Headquarters Functional Offices.

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## 1. Purpose

The purpose of the Outreach OWI is to document the process by which the OSDBU communicates knowledge, seeks, establishes and maintains relationships with the small business community, prime contractors, trade associations, and other external organizations.

## 2. Scope and Applicability

### 2.1

This OWI documents the process to conduct conferences, forums, and training, distribute standard information packets, develop promotional literature, and conduct the Minority Business and Advocates Awards Program.

### 2.2

This OWI applies to the Code K organization.

## 3. Definitions

- 3.1 AA. Associate Administrator
- 3.2 AO. Action Officer
- 3.3 Blue Line. Final version of document before going to print
- 3.4 Code A. Office of the Administrator
- 3.5 Code K Mailing Lists. List of businesses and individuals designated to receive Code K mailings. Stored electronically on the Shared Drive
- 3.6 MBAA. Minority Business and Advocates Awards
- 3.7 Shared drive. Code K computer network shared drive located at:  
Code\_k on 'hqdata2' (U:)

## 4. References

- 4.1 Code K Web site [www.hq.nasa.gov/office/codek](http://www.hq.nasa.gov/office/codek)
- 4.2 Conferences, Forums, and Training Evaluation Form (OSDBU Form 123)
- 4.3 Conferences, Forums, and Training Evaluation Form Summary (OSDBU Form 124)
- 4.4 MBAA Ceremony Survey (OSDBU Form 116), located at: Code\_k on 'hqdata2' (U:)
- 4.5 MBAA Nomination Evaluation Form (OSDBU Form 117), located at: Code\_k on 'hqdata2' (U:)
- 4.6 MBAA Program Checklist (OSDBU Form 120), located at: Code\_k on 'hqdata2' (U:)
- 4.7 MBAA Program Evaluation Summary (OSDBU Form 118), located at: Code\_k on 'hqdata2' (U:)

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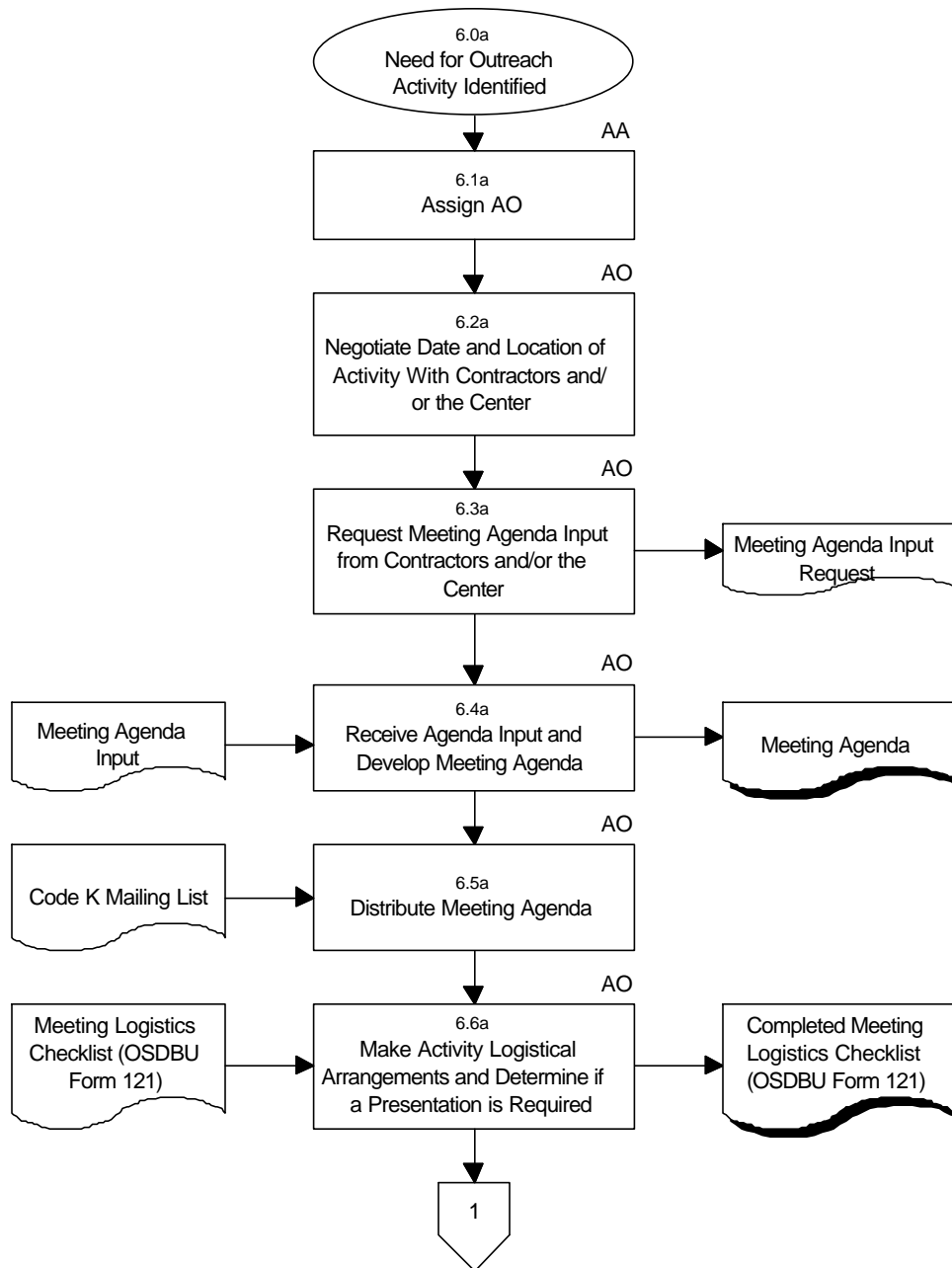
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- |      |   |
|------|---|
| 4.8  | Meeting Logistics Checklist (OSDBU Form 121), located at: Code_k on 'hqdata2' (U:)  |
| 4.9  | NASA Strategic Management Handbook (NPG 1000.2)                                     |
| 4.10 | NASA Strategic Plan (NPD 1000.1)  |
| 4.11 | Problem Solving Request Form (OSDBU Form 105), located at: Code_k on 'hqdata2' (U:) |
| 4.12 | Routing/Closeout Form (OSDBU Form 122), located at: Code_k on 'hqdata2' (U:)        |

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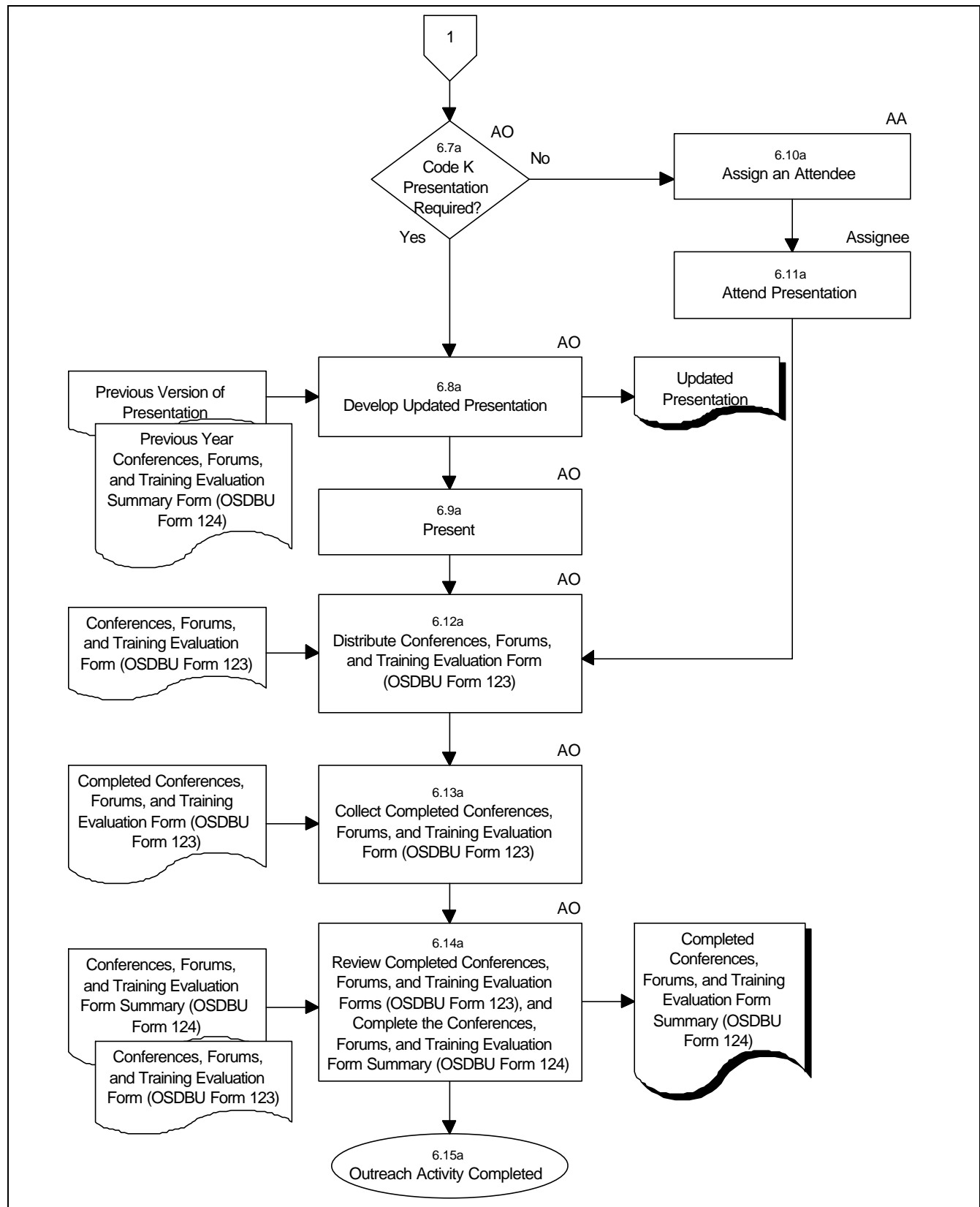
## 5. Flowchart

### Flow (a) - Conduct Conferences, Forums, and Training



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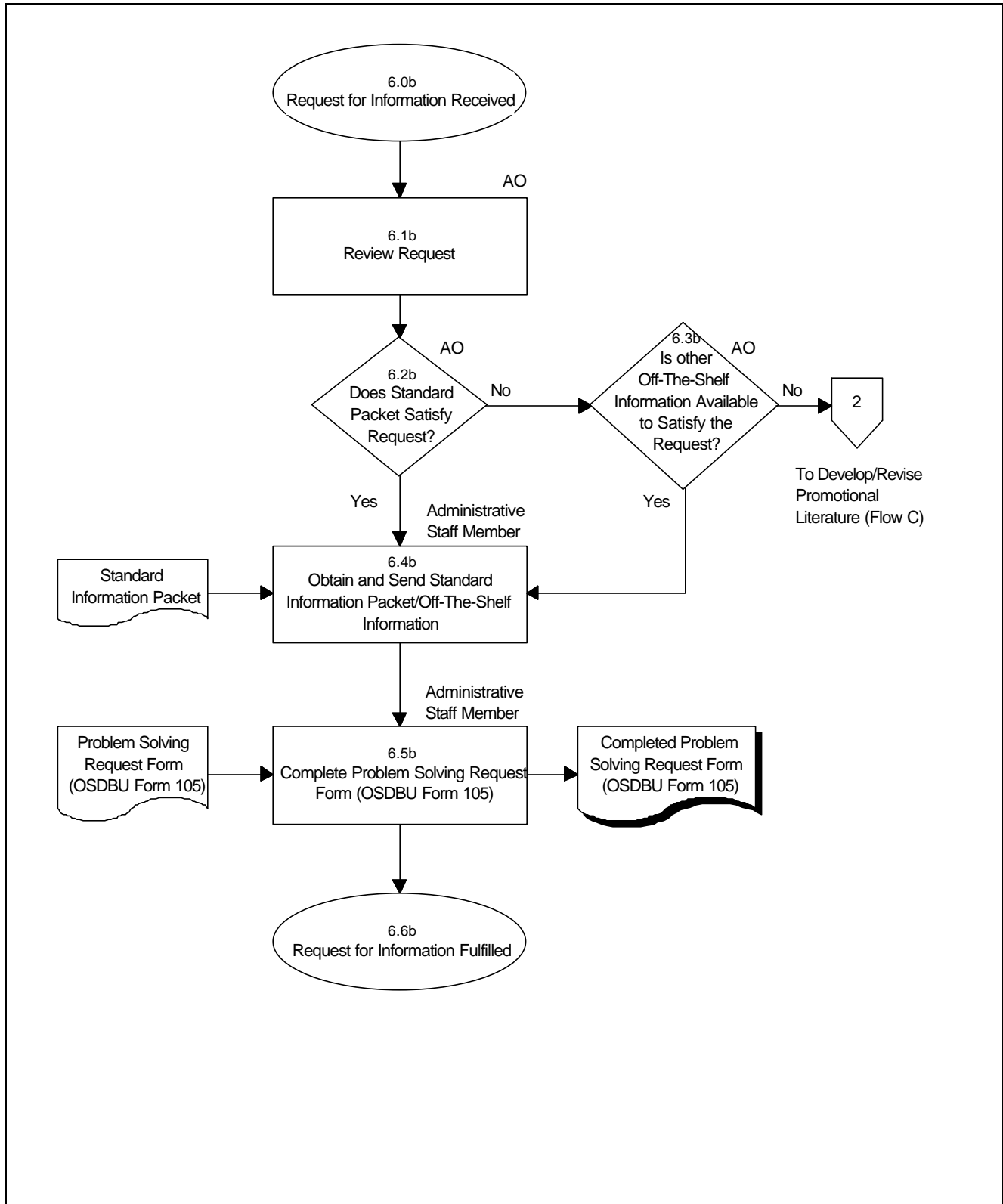
## Flow (a) - Conduct Conferences, Forums, and Training - continued



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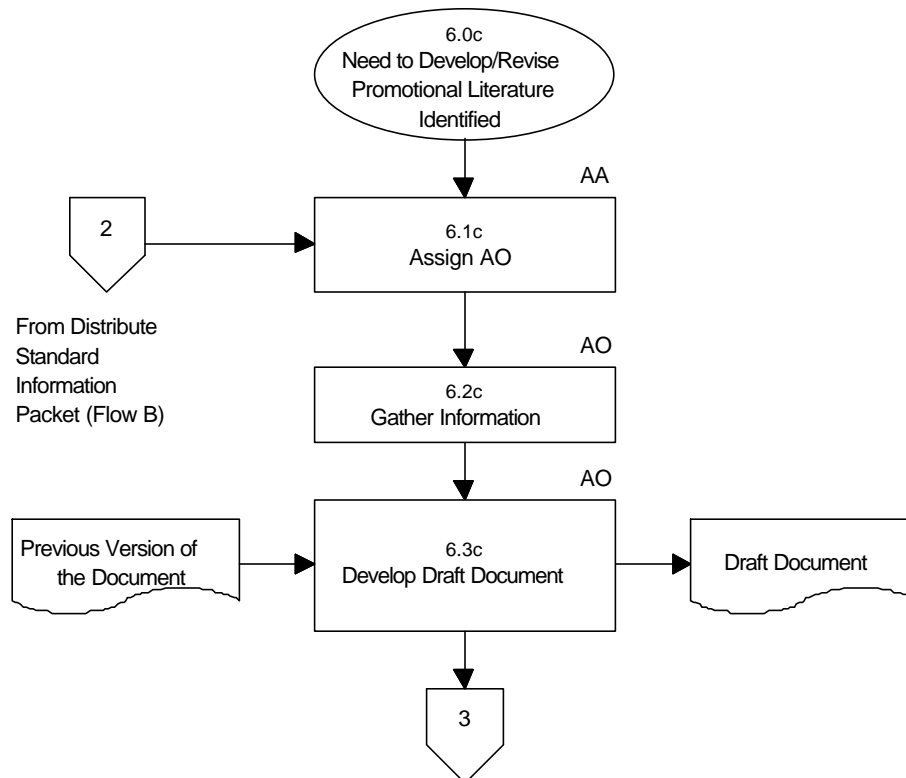
## Flow (b) - Distribute Standard Information Packet



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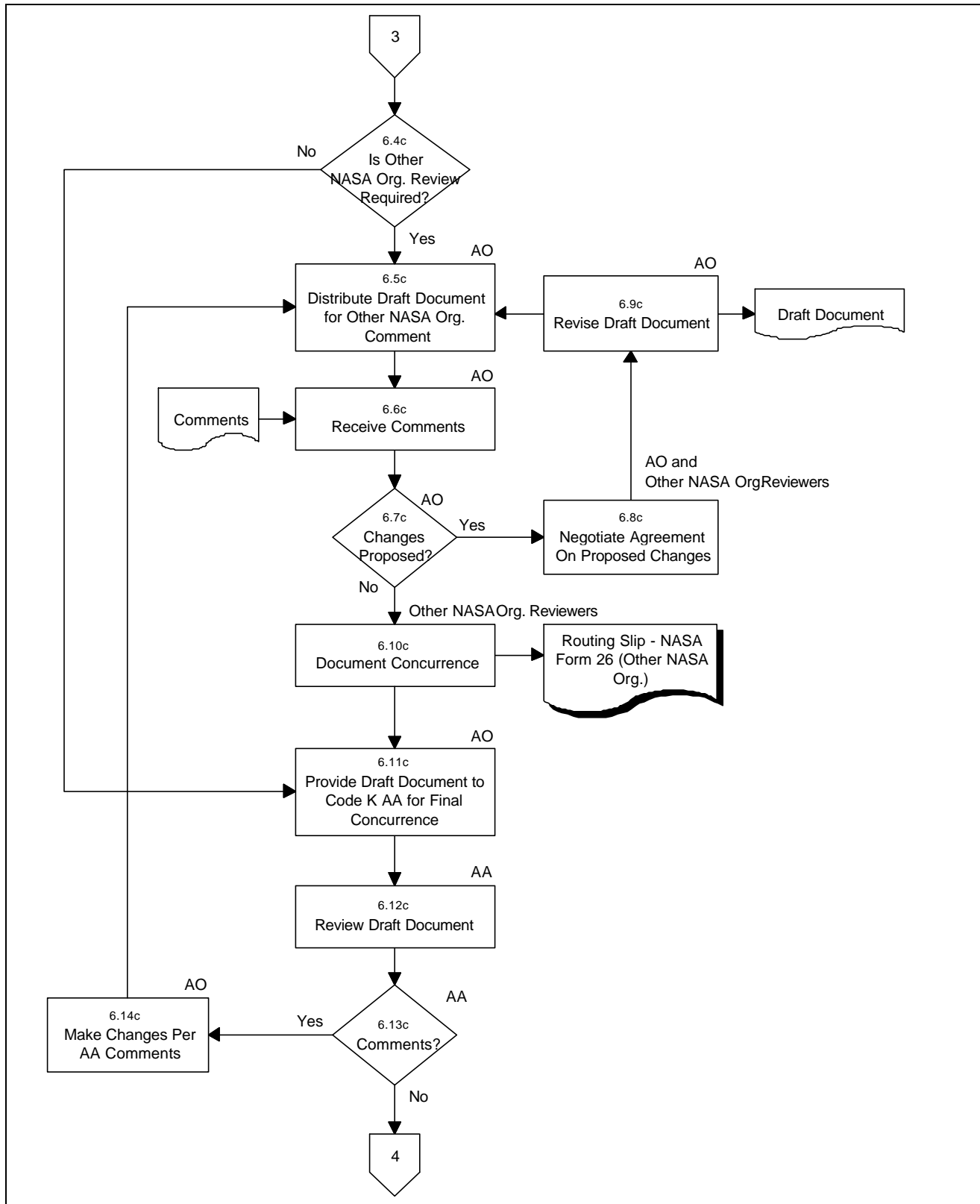
### Flow (c) – Develop/Revise Promotional Literature





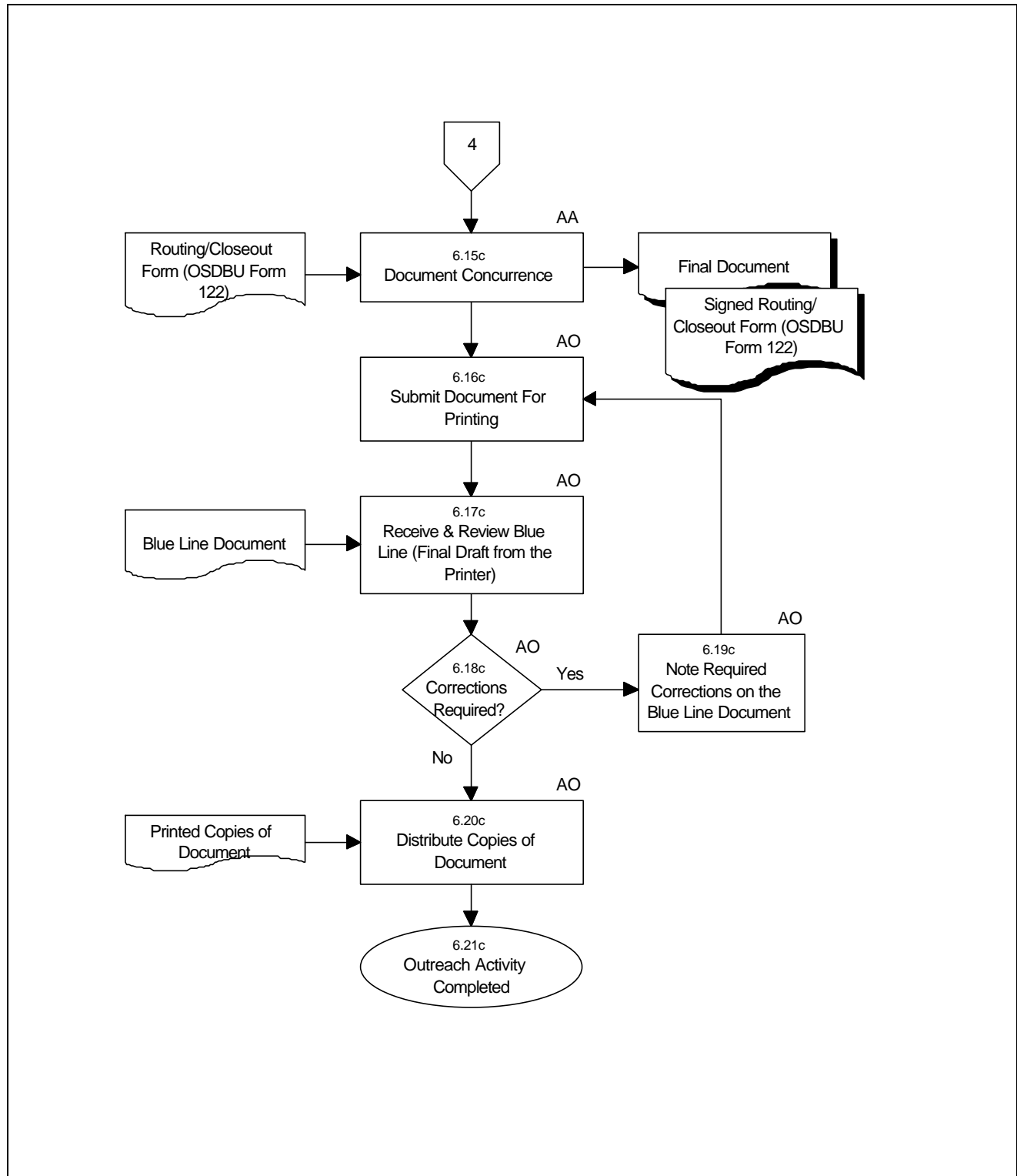
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## Flow (c) – Develop/Revise Promotional Literature - continued



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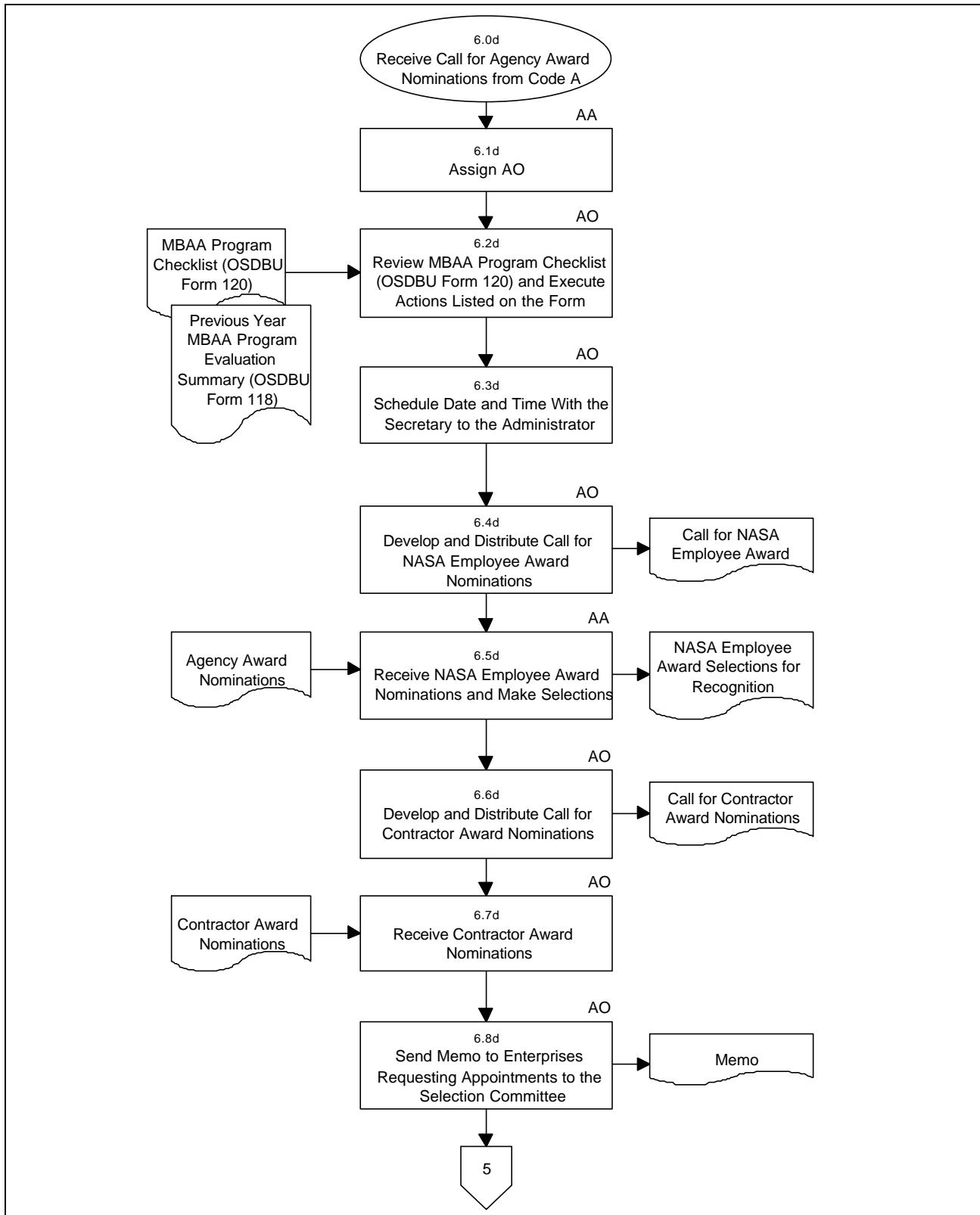
### Flow (c) – Develop/Revise Promotional Literature - continued



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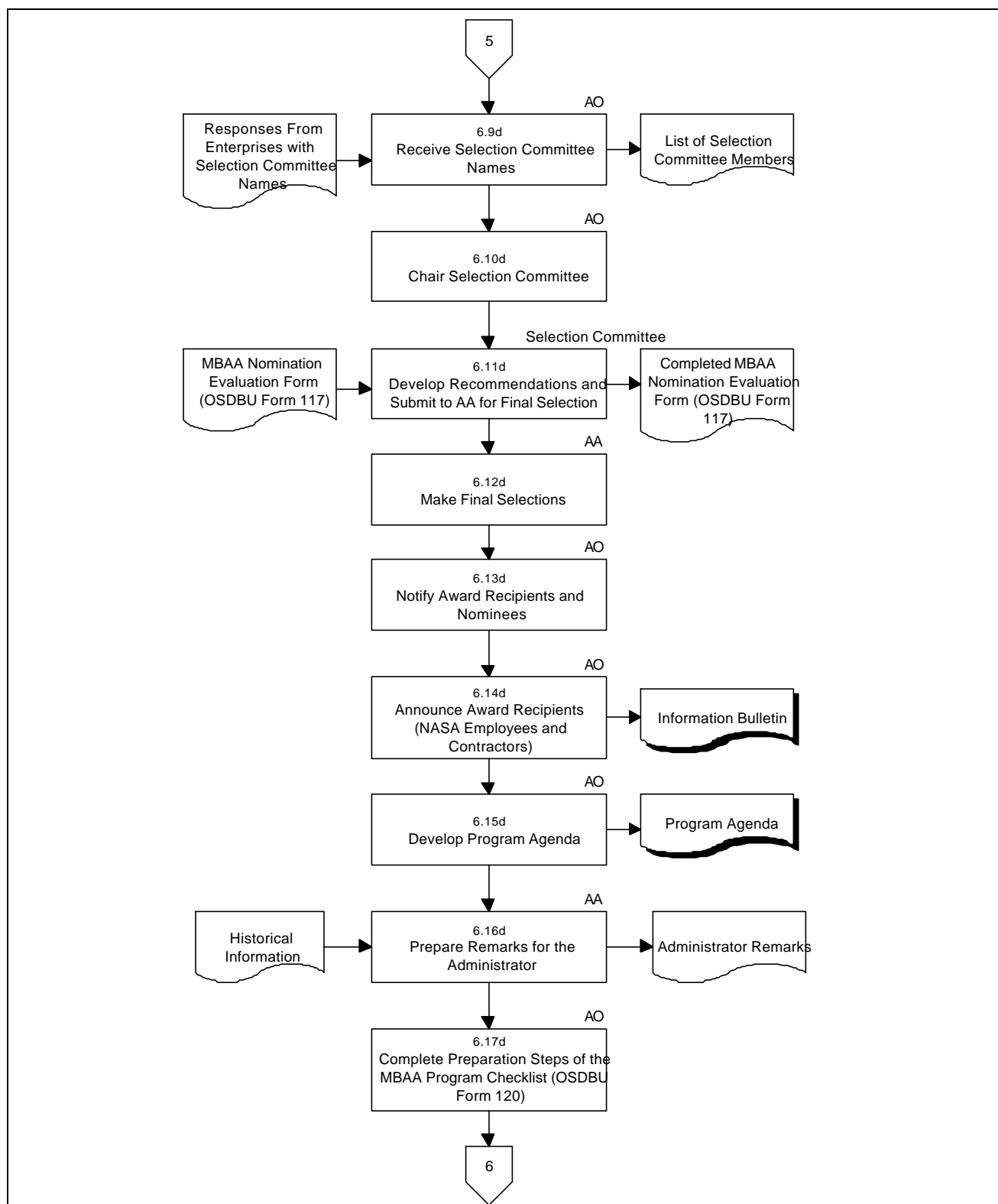
## Flow (d) - Conduct MBAA Program



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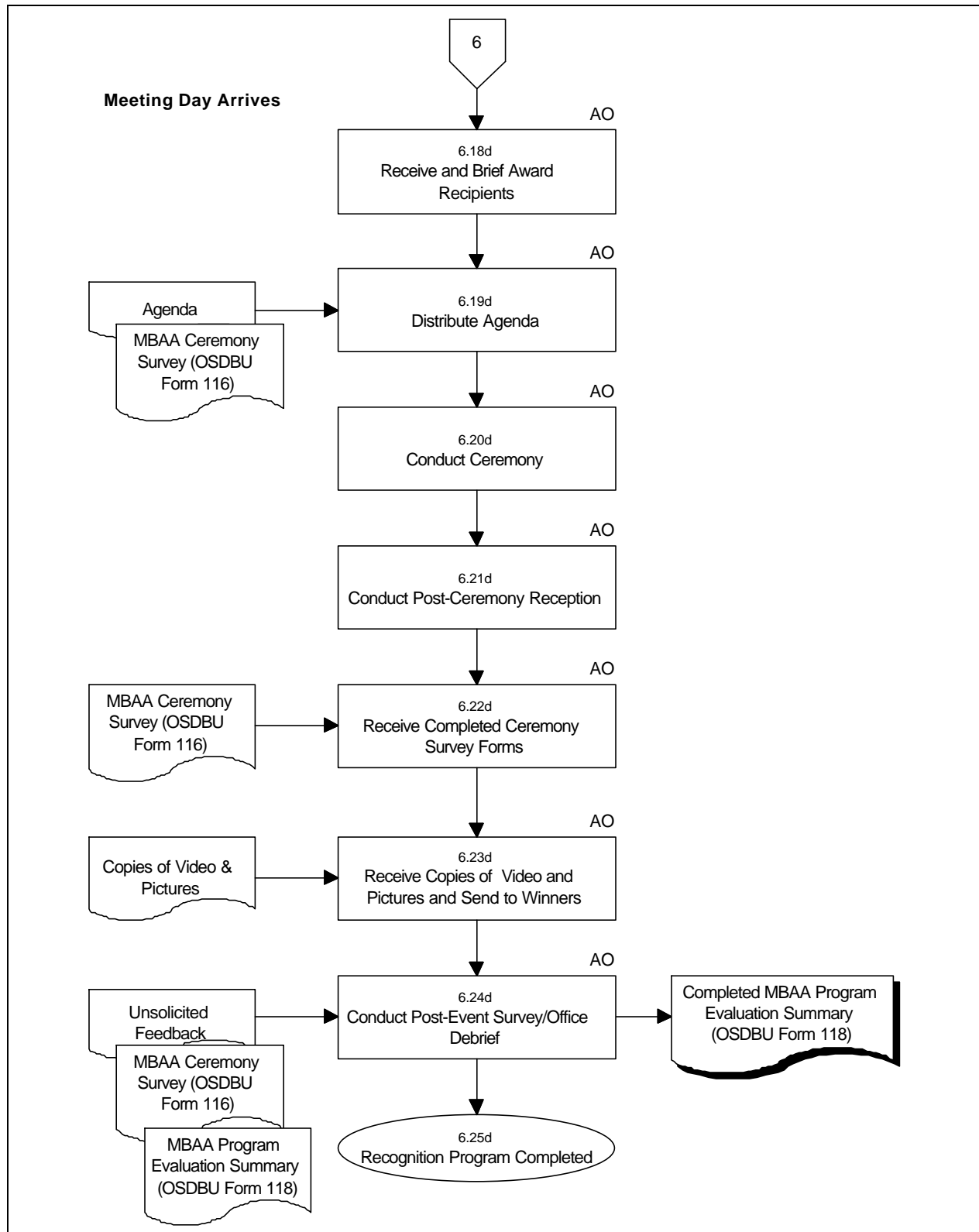
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## Flow (d) - Conduct MBAA Program - continued



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## Flow (d) - Conduct MBAA Program - continued



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## 6. Procedure

### Flow A. Conduct Conferences, Forums, and Training

Step	Actionee	Action
6.0a		<p>Outreach activities include conferences, forums, and training. The list of Outreach Events is located on the Code K Shared Drive at: Code_K on 'hqdata2' (U:).</p> <p>Other outreach activities may result from requests from the small business community and be incorporated into the Code K program.</p>
6.1a	AA	Assign a cognizant action officer to conduct the outreach activity. This assignment is made based on Program responsibilities and availability.
6.2a	AO	Negotiate date and location of activity with contractors and/or the Center. Contractors are involved in the coordination of the training, and the major NASA Conferences. NASA Centers are involved in the coordination of the major Forums. This is done via phone and/or email.
6.3a	AO	Request meeting agenda input from contractors and/or the Center. The action officer works with the contractors to develop the agenda for the conferences, forums and training. The request to the contractors/Centers could be sent via email or phone.
6.4a	AO	Receive agenda input and develop meeting agenda. The meeting agenda input from the contractors/Centers could be sent via email or phone. Based on the input from the contractors/Center, the meeting agenda is developed.
6.5a	AO	Distribute the Meeting Agenda to the audience via email or mail. The audience includes activity registrants and individuals on the Code K Mailing Lists. The Meeting Agenda/announcement may also be posted on the Code K web site.
6.6a	AO	Make activity logistical arrangements as specified in the Meeting Logistics Checklist (OSDBU Form 121). Complete the Meeting Logistics Checklist (OSDBU Form 121) to ensure that all logistics are addressed. Determine if a presentation is required. A presentation is generally required during conferences and training. Forums rarely require presentations.
6.7a	AO	If a Code K presentation is required, go to Step 6.8a. If a Code K presentation is not required, go to Step 6.10a.
6.8a	AO	Develop Updated Draft Presentation based on the previous version of the presentation (if available), and the previous year Conferences, Forums, and Training Evaluation Form Summary (OSDBU Form 124). The Updated Draft Presentation should include relevant and current information about the topic being discussed. Coordinate with AA.
6.9a	AO	Present to the audience at the conference, forum or training activity.
6.10a	AA	Assign a cognizant Code K staff member to attend the presentation.
6.11a	Assignee	Attend the Presentation.
6.12a	AO	Distribute Conferences, Forums, and Training Evaluation Form (OSDBU Form 123) to the audience after the presentation on the day of the activity.
6.13a	AO	Collect Completed Conferences, Forums, and Training Evaluation Form (OSDBU Form 123) from the audience before they leave.
6.14a	AO	Review the Completed Conferences, Forums, and Training Evaluation Forms (OSDBU Form 123). Complete the Conferences, Forums, and Training

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<u>Step</u>	<u>Actionee</u>	<u>Action</u>
		Evaluation Form Summary (OSDBU Form 124) based on Action officer notes and the Completed Conferences, Forums, and Training Evaluation Forms (OSDBU Form 123). All Forms listed are reviewed for completeness and accuracy.
6.15a		Outreach activity completed.

#### Flow B. Distribute Standard Information Packet

<u>Step</u>	<u>Actionee</u>	<u>Action</u>
6.0b		Requests for information are received from internal (Headquarters, Centers) and external sources (business, general public, or others). Requests come by phone, mail, fax, or email.
6.1b	AO	Review the request to determine if the Standard Information Packet or other off-the-shelf information includes the requested information. Examples of Off-the-shelf information include pamphlets regarding OSDBU activities, newsletters, annual reports, or NASA publications.
6.2b	AO	If the Standard Information Packet satisfies the request, go to Step 6.4b. If Standard Information Packet does not satisfy the request, go to Step 6.3b.
6.3b	AO	If the other off-the-shelf information satisfies the request, go to Step 6.4b. If the other off-the-shelf information does not satisfy the request, go to off-page connector #2 in the Develop Promotional Literature Flowchart (Flow C).
6.4b	Administrative Staff Member	Obtain the Standard Information Packet and/or off-the-shelf information from inventory and send it to the requestor. Duplicates of the Standard Information Packet can be made from the original copy, which is maintained in Code K. The Standard packet/off-the-shelf information is distributed by mail (hardcopy).
6.5b	Administrative Staff Member	Complete Problem Solving Request Form (OSDBU Form 105) based on information provided in the original request by the requestor.
6.6b		Request for Information Fulfilled.

#### Flow C. Develop Promotional Literature

<u>Step</u>	<u>Actionee</u>	<u>Action</u>
6.0c		AA determines that promotional literature must be developed or revised to respond to a request. Requests are received from internal (Headquarters, Centers) and external sources (business, general public, or others). Requests come by phone, mail, or email.
6.1c	AA	Assign a cognizant action officer to develop/review the promotional literature. This decision is based on program responsibility and availability.
6.2c	AO	Gather information to answer specific issues, questions, etc. presented in the request. The information gathered comes from cognizant Headquarters offices and Centers.
6.3c	AO	Develop the draft document based on information gathered and previous version of the document. Coordinate with cognizant Code K staff. Determine if other NASA organizations should review the document. Organizations are selected to

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		review the document if it, in the judgement of the AO, is of interest to their organization.
6.4c	AO	If other NASA organization review is required, go to Step 6.5c. If no other NASA organization review is required, go to 6.11c.
6.5c	AO	Distribute draft document (hard copy) with routing slip and due date to other NASA organizations for comment and review. Distribute to reviewers as defined in Step 6.3c. If comments are not received by the due date, concurrence is assumed. Identify Reviewers based on topic and specifics of request. Reviewers are subject matter experts at NASA Headquarters or Centers that represent Codes or mission program areas, and are available to serve as reviewers. For example Code K is requested to provide a story on small business success in Space Science. Code S (Space Science) would be identified as a reviewer for the story because they have responsibility for mission program areas addressing Space Science.
6.6c	AO	Receive comments from other NASA org. reviewers.
6.7c	AO	If there are changes proposed, then go to Step 6.8c. If there are no changes proposed, go to Step 6.10c
6.8c	AO and Other NASA Org Reviewers	Negotiate Agreement on proposed changes. Obtain consensus through discussion with Other NASA Org. Reviewers (individually or as a group). If agreement can not be reached, the AA or designee of the disagreeing Other NASA Org. will be consulted for resolution. Code K AA has final authority.
6.9c	AO	Develop revised draft document based on negotiated changes, and return to Step 6.5c.
6.10c	Other NASA Org. Reviewers	Document Concurrence. Each reviewer signs off on a routing slip (NASA Form 26) accompanying the draft document.
6.11c	AO	Provide draft document to Code K AA for Final Concurrence.
6.12c	AA	Review draft document for content, flow, clarity, and accuracy. Proposed changes are noted on the hardcopy.
6.13c	AA	If the AA has comments, go to Step 6.14c. If the AA does not have comments, go to Step 6.15c.
6.14c	AO	Make changes per AA comments, and return to Step 6.5c.
6.15c	AA	Document Concurrence. AA completes and signs the Routing/Closeout Form (OSDBU Form 122).
6.16c	AO	Submit document for printing to Headquarters Printing and Design shop in electronic form.



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<u>Step</u>	<u>Actionee</u>	<u>Action</u>
6.17c	AO	Receive and review blue line for proper formatting.
6.18c	AO	If corrections are required, go to Step 6.19c. If no corrections are required, go to Step 6.20c.
6.19c	AO	Note required corrections on the blue line Document, and return to Step 6.16c.
6.20c	AO	Distribute copies of the document to affected internal organizations and external organizations that are included in the Code K Mailing Lists. The documents are distributed by mail.
6.21c		Outreach activity completed.

#### Flow D. Conduct MBAA Program

<u>Step</u>	<u>Actionee</u>	<u>Action</u>
6.0d		Call letter received from Code A announcing request for nomination for Agency Minority Business and Advocates Awards (MBAA) Exceptional Achievement Medal Program by internal mail. Letter includes Awards Categories, criteria for award, due date, and point of contact. Letter is usually initiated in November annually.
6.1d	AA	Assign to action officer with program responsibility to oversee the MBAA process.
6.2d	AO	Review MBAA Program Checklist (OSDBU Form 120) and execute actions listed on the form. Previous year MBAA Program Evaluation Summary (OSDBU Form 118) is reviewed for lessons learned. Checklist is located in MBAA file on shared drive.
6.3d	AO	Contact Administrator's secretary and schedule date, time and details of MBAA program. Communicate by email and follow up with phone call.
6.4d	AO	Develop and distribute call for NASA Employee Award Nominations. The letter is sent to NASA Center Directors. The letter includes criteria for award and submission due date. It is sent by internal mail.
6.5d	AO	Receive Employee nominations from field Centers. Nominations are forwarded from Centers to Code K and time-date stamped upon arrival. Nominations not received by due date are disqualified. Code K office staff evaluates nominations and makes selections. AA has final selection authority over nominations and may elect not to confer an award if not satisfied with nominations.
6.6d	AO	Develop letter to send to Centers and prime contractors to announce the solicitation of nominations for MBAA contractor awards. The letter also announces the date, time, place, and submission due date. Other detailed information about the MBAA program is also included.
6.7d	AO	Receive award nominations from contractors and Centers by due date. Nominations not received by due date are disqualified. Code K office staff evaluates nominations and makes selections. AA has final selection authority over nominations and may elect not to confer an award if not satisfied with nominations.
6.8d	AO	Send Memo to Enterprises requesting appointment of members to participate on selection committee. Each Enterprise shall appoint only one, and the chair of the committee shall be a representative from Code K.

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<u>Step</u>	<u>Actionee</u>	<u>Action</u>
6.9d	AO	Receive responses from Enterprises with appointment of representatives to serve on the MBAA Selection Committee.
6.10d	AO	Chair the selection committee. The chairperson is responsible for articulating guidelines for evaluating the nominations, provides scoring criteria, and tallies all scores and submits the results to the AA for Code K.
6.11d	Selection Committee	Tally all scores from selection committee and prepare recommendations to submit to AA for final selection. Scores are tallied using the MBAA Nomination Evaluation Form (OSDBU Form 117) submitted by the selection committee members.
6.12d	AA	Make final selections after reviewing the MBAA Nomination Evaluation Form (OSDBU Form 117). Consider recommended nominations and other knowledge about the nominees.
6.13d	AO	Notify winners. Additionally, winners are provided other detailed information about the program such as when, where, and how the program will take place and what to expect. The winners are notified by phone and followed up by official letter.
6.14d	AO	Announce winners via Code K Information Bulletin. Information Bulletin contains information about the MBAA awards program. It is sent out via fax to people on the Code K mailing lists and is posted on the Code K web site.
6.15d	AO	Develop program agenda. Agenda contains the names of awards recipients and the order of program. The agenda is developed using information obtained during the nomination process.
6.16d	AA	Prepare remarks for the Administrator. AA provides remarks for Administrator. The remarks are developed based on a relevant theme or specific leadership message that is to be conveyed to the audience. The AA also relies on historical information and input from staff when formulating remarks.
6.17d	AO	Complete and check off preparation steps listed on the MBAA Program Checklist (OSDBU Form 120) before the MBAA ceremony is held.
6.18d	AO	Receive and brief award recipients. Approximately 1 hour before event, the award recipients arrive at a designated location for instructions on how the program will proceed.
6.19d	AO	Distribute agenda. The awards program is held in the Headquarters auditorium and Code K staff serves as hosts and pass out the awards program as the audience arrives. MBAA Ceremony Survey (OSDBU Form 116) is also included with the agenda.
6.20d	AO	Conduct ceremony.
6.21d	AO	Conduct post ceremony reception.
6.22d	AO	Receive completed MBAA Ceremony Survey (OSDBU Form 116) on day of program or after day of program by mail.
6.23d	AO	Receive copies of video and pictures from the Headquarters photographer and NASA TV, and send to award recipients.
6.24d	AO	Conduct post-event survey/Office Debrief. The Code K staff meets to discuss general feedback and review results of survey form and provide comments on MBAA Program Evaluation Summary (OSDBU Form 118).

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<u>Step</u>	<u>Actionee</u>	<u>Action</u>
6.25d		Program Complete.

## 7. Quality Records

<u>Record ID</u>	<u>Owner</u>	<u>Location</u>	<u>Record Media: Electronic or Hard Copy</u>	<u>NPG 1441.1 Schedule and Item Number</u>	<u>Retention/Disposition</u>
Meeting Agenda	Code K	Code K Files	Hard Copy	Schedule 1, Item 22	Permanent. Retire to FRC when 5 years old in 5 year blocks. Transfer to NARA when 10 years old.
Completed Meeting Logistics Checklist (OSDBU Form 121)	Code K	Code K Files	Hard Copy	Schedule 1, Item 25	Remove from related records and destroy or delete when work is completed or when no longer needed for operating purposes.
Updated Presentation	Code K	Code K Files	Hard Copy	Schedule 1, Item 22	Permanent. Retire to FRC when 5 years old in 5 year blocks. Transfer to NARA when 10 years old.
Completed Conferences, Forums, and Training Evaluation Summary Form (OSDBU Form 124)	Code K	Code K Files	Hard Copy	Schedule 1, Item 22	Permanent. Retire to FRC when 5 years old in 5 year blocks. Transfer to NARA when 10 years old.
Completed Problem Solving Request Form (OSDBU Form 105)	Code K	Code K Files	Hard Copy	Schedule 1, Item 25	Remove from related records and destroy or delete when work is completed or when no longer needed for operating purposes.
Routing Slip – NASA Form 26 (Other NASA Org.)	Code K	Code K Files	Hard Copy	Schedule 1, Item 25	Remove from related records and destroy or delete when work is completed or when no longer needed for operating purposes.
Final Document	Code K	Code K Files	Hard Copy	Schedule 1, Item 22	Permanent. Retire to FRC when 5 years old in 5 year blocks. Transfer to NARA when 10 years old.

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Signed Routing/ Closeout Form (OSDBU Form 122)	Code K	Code K Files	Hard Copy	Schedule 1, Item 25	Remove from related records and destroy or delete when work is completed or when no longer needed for operating purposes.
Information Bulletin	Code K	Code K Files	Hard Copy	Schedule 1, Item 22	Permanent. Retire to FRC when 5 years old in 5 year blocks. Transfer to NARA when 10 years old.
Program Agenda	Code K	Code K Files	Hard Copy	Schedule 1, Item 22	Permanent. Retire to FRC when 5 years old in 5 year blocks. Transfer to NARA when 10 years old.
Completed MBAA Program Evaluation Summary (OSDBU Form 118)	Code K	Code K Files	Hard Copy	Schedule 1, Item 22	Permanent. Retire to FRC when 5 years old in 5 year blocks. Transfer to NARA when 10 years old.